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ABSTRACT

This book was designed to serve as a guide for the small and medium-sized firm establishing a systematic training pattern for the first time, and to the larger company for whom it will act as a useful check list. The guide examines the kind of information required and the ways in which actual companies have arrived at their training requirements in a systematic way. A list of questions is presented to direct a company as to the kind of questions it should ask itself before embarking on a systematic training program. These questions relate to the company's future plans, its theories about organization, standards of performance, ideas about delegation of authority, labor turnover, employee satisfaction, training of sales personnel, cost effectiveness, stock control, quality, industrial relations, the law, and safety. As a final stage in establishing a training pattern, three steps are suggested for implementation once the questions have been answered. These are: (1) Collate the findings; (2) Group the needs; and (3) Add the facts and examine the benefits. (CK)

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YSTEMATIC TRAINING GUIDE No 1

EXAMINE COMPANY, PLANS & PROBLEMS

ASSESS OVERALL TRAINING NEEDS

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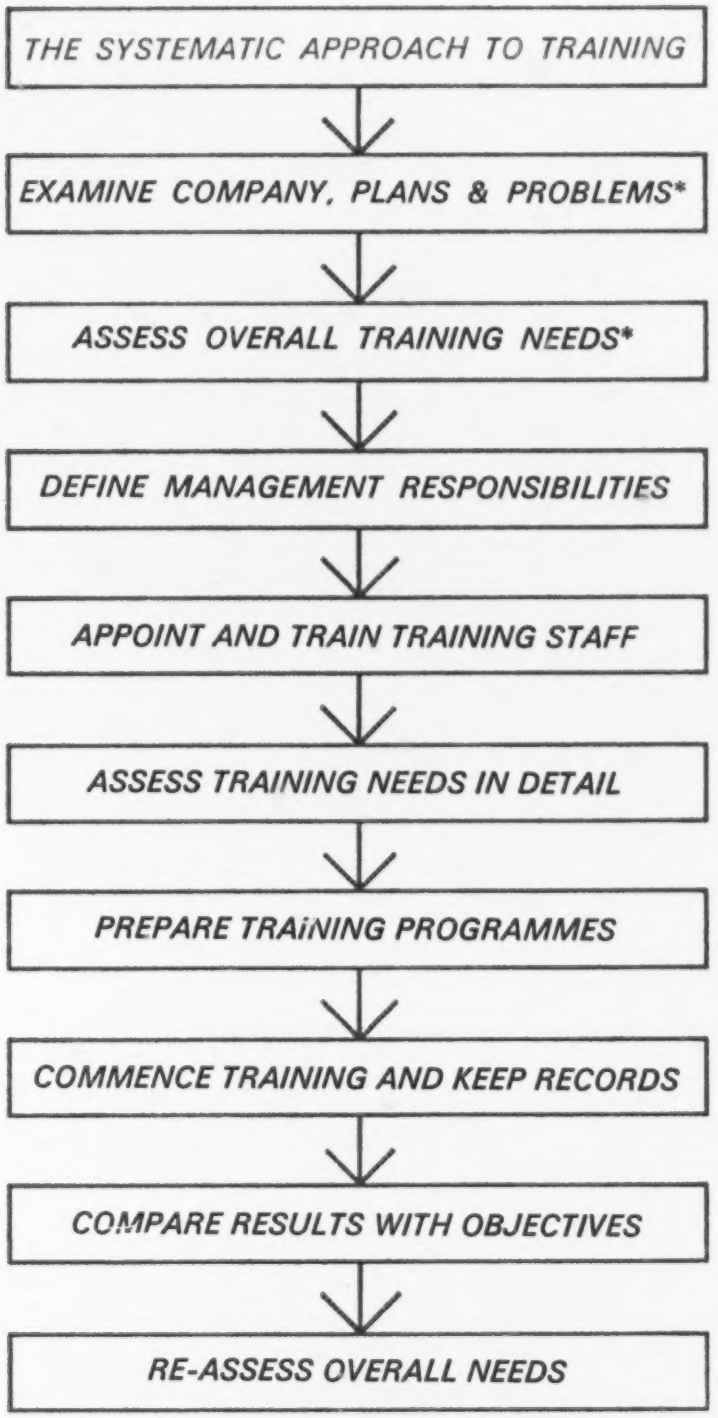
THE SYSTEMATIC APPROACH TO TRAINING
EXAMINE COMPANY, PLANS & PROBLEMS*
ASSESS OVERALL TRAINING NEEDS*
DEFINE MANAGEMENT RESPONSIBILITIES
APPOINT AND TRAIN TRAINING STAFF
ASSESS TRAINING NEEDS IN DETAIL
PREPARE TRAINING PROGRAMMES
COMMENCE TRAINING AND KEEP RECORDS
COMPARE RESULTS WITH OBJECTIVES
RE-ASSESS OVERALL NEEDS

*These two stages are the subject of this guide

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Although a large number of businesses accept the need for market research, work study, and budgetary control, their attitudes to training — *an equally effective management tool, if properly used* — are far from unanimous.

The fact is that training can, and frequently does, lead to very worthwhile increases in a company's profitability, especially if approached systematically.

To approach training systematically means that first you must ascertain which aspects of your operation are most in need of improvement. That is the subject of this guide, the first in a series dealing with the various stages of systematic training.

The Board believes that, because of the way in which it has been prepared, the guidance in these pages will be valuable to the small and medium-sized firm establishing a systematic training pattern for the first time, and to the larger company for whom it will act as useful check list.

"How is the assessment carried out-and by whom?"

There are sometimes said to be two methods by which a company can determine its overall training needs. In practice they are closely related. It can EITHER : start by examining its entire operation 'from scratch' using a process similar to the one about to be outlined ; OR it can take as its starting point some of its (apparently) more pressing problems.

Many businessmen and professional trainers regard the second method as the more realistic. However, it has the possible disadvantage that certain obscure-but-vital requirements could be passed over in favour of more-obvious-but-less-urgent ones.

For the purpose of this guide, therefore, the more comprehensive self-examination process is recommended. This is done by asking oneself a number of searching questions which, for simplicity, have been arranged in this guide under fourteen major headings.

THE FOURTEEN KEY INVESTIGATION AREAS

1. Planning
2. Organisation
3. Performance
4. Delegation
5. Recruitment and labour turnover
6. Careers and pay
7. Sales
8. Costs and finance
9. Methods
10. Stock control
11. Quality and hygiene
12. Industrial relations
13. The Law
14. Safety

Three methods

To obtain the *correct* information in these areas it is essential that *three* techniques are used simultaneously, each being a check on the other. The aim must be to replace beliefs and prejudices with FACTS.

EXCHANGING 'FEELINGS' FOR FACTS: THREE METHODS

DISCUSSION & INTERVIEW
with management, supervisors *and* workforce

OBSERVATION of working processes to see where improvements can be effected

EXAMINATION of existing data e.g. internal, competitive and governmental statistics

The right choice of assessor
Obviously, an assessment of this kind must be objective. Therefore it should embody the views of everyone likely to be affected by any conclusions drawn from it. Nevertheless, *somebody* must ultimately compile the findings and make the draft assessment.

This should always be a senior manager. Even if he has no experience of the task, he should at least have an understanding of its importance, together with an aptitude for information-gathering. The actual person selected will depend largely on the size of the firm.

WHO SHOULD CARRY OUT THE ASSESSMENT ?

IN A LARGE COMPANY
Here the training needs are likely to be complex and obscure. The assessment should be undertaken only by a *qualified training officer,* or a *management consultant* specialising in this field.

IN A MEDIUM-SIZED COMPANY
The ideal person in this case is the *senior manager* acting as part-time training officer. He may wish to *work closely with an outside consultancy,* e.g. the Board's training department.

IN A SMALL COMPANY
Frequently the information will be known to management without a great deal of research. *A senior manager* should be responsible for its collation and presentation *after consulting everyone concerned.*

A suggested plan
As a help to non-professional training managers who may find themselves responsible for assessing the needs of a medium-sized company, here is a suggested plan of campaign. Notice the emphasis on discussion and co-operation at every stage.

FACT-FINDING IN THE SMALLER COMPANY

1. *Call a meeting of key people*
– managers, supervisors, training staff (if any) and employee representatives.

2. *Call for departmental reports*
– ask each departmental head to consult with his staff and then to complete a standard questionnaire of the type portrayed in the next section of this guide.

3. *Discuss reports with departmental heads*
– agree training priorities and implications.

4. *Hold group discussions with all concerned*
– and with higher management to ensure that plans are compatible with firm's overall policies.

5. *Draw up AGREED report*
– including main training needs and priorities, who will be responsible, and when training is to commence.

The remainder of this guide is devoted to a somewhat closer look at the kind of information required, and the ways in which actual companies have arrived at their training requirements in a systematic way.

At this point some managers will feel that they know all there is to know about their company. Nevertheless, a little time spent looking through the examples might be found both interesting and stimulating.

"What questions should we ask ourselves..?"

"...about future plans"

A word of warning at the outset: it is relatively easy under some headings, particularly this one, to see where some training will be required – but considerably more difficult to decide exactly what that training should be. More will be said about this in future guides.

The classic example is the company that installs a computer, sees a training need, and proceeds to prepare its clerical staff to operate the system (which they do very well). After a long period of unprofitable use it learns that the computer is not being used enough. The *real* need was for management to be trained in computer appreciation.

Case Extract

An out-station for packing fresh vegetables opened each season with only about 60% of its previous year's staff; the remaining 40% was new. Because the work was considered 'unskilled' no training was provided. Trade increased rapidly creating a need for a second station. In preparation for the second station's opening, since no experienced staff were available, it was decided to embark on a complete systematic training programme – for supervisors and operatives. Subsequently it was discovered that labour costs of the second station were substantially lower, and output higher, than that of the station manned with 'experienced' staff. There was only one difference: the effect of job analysis and training.

This example illustrates a very important point. The value of training was discovered only as a result of planning for a new station. Had the performance of the first station been studied more closely, the possible benefit of training might have been spotted earlier.

KEY INVESTIGATION AREA NO.1 – PLANNING

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Are we expanding or contracting ? Will this mean more employees ? Or new skills for existing employees ? What other preparations advisable ?		
Are we making product changes ? Will staff require : – practice with new materials ? – a new set of skills ? – new knowledge or attitudes ?		
Are we changing our process ? Will this mean : – 'training-in' new equipment ? – acquiring new skills ? – new knowledge ? – new regulations, etc ?		
Will we change our procedures ? Will this mean new systems ? – or major adjustments ?		
Do managers know how to extract essential information ?		
Are they capable of planning effectively ?		
WHO WILL BE AFFECTED BY FUTURE PLANS – AND HOW ?		

"...about the organisation"

There are many schools of thought about organisation. Some people believe that the hierarchical or 'tree' structure is the only durable way. Others would like to see a wider acceptance of group decision-taking.

Whichever theory you subscribe to, the important point is to be able to define the structure of the company. Once people understand their role, and the limits of their authority, the training need becomes the pleasant task of demonstrating the opportunities open to them.

Case Extract

A second generation bakery firm discovered that its expansion plans were being frustrated. Sufficient capital was available, and there was every indication that the market was ripe for expansion. A preliminary examination revealed that its management structure and the jobs carried out by its managers were not appropriate: the managing director spent the greater part of his time supervising production (not surprisingly, since his father had ensured that he was trained as a baker); and the sales manager's actual job was checking-out the vans in the morning and checking-in the stock and cash in the evening. After consultation with an outside agency, the managing director decided to recruit a production manager. He also redefined the sales manager's job – giving him direct control of the van salesmen: their recruitment, training and daily performance – for which he required considerable coaching carried out by the managing director himself. These changes freed the managing director from his over-riding involvement in production and allowed him to exercise his management function, with the result that the company's expansion plan began to bite.

Frequently what may appear to be a training need is a need for organisational change. Having made the necessary change, the need for training becomes something different, as in this case.

KEY INVESTIGATION AREA NO.2 – ORGANISATION

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Have *all* jobs been outlined ?		
Are all employees (management, supervisors and operators) aware of their *precise* – role ? – responsibilities ? – authority ?		
Do any jobs overlap ?		
Have we had any problems of – authority ? – demarcation ?		
Does the company's organisation really match up to the needs of business ?		
Is management aware of alternative methods of organisation ?		

"...about performance"

It is sometimes suggested that standards of performance can be applied only to manual tasks. This is not so. More and more companies are setting standards for all categories of employee, including managerial and clerical. However, it can be damaging to announce standards without providing the means of attaining them – which includes training. New standards, and new methods, must normally be 'trained-in' to be successful.

Case Extract

A large organisation in the food sector, with several large administrative departments, called in O & M consultants to improve its flow of clerical work. As a result, a manual of procedures was drawn up and a copy provided for each department. In some departments the manual was 'trained-in'; in others, for various reasons, it was not. After a period the departments in which the manual had been properly explained showed a 9% saving in staff costs – amounting to several thousand pounds – compared with no saving in the untrained departments.

Although cited here primarily as an example of 'performance', this finding also verifies what has already been noted under 'planning': i.e. new procedures invariably suggest training requirements. It also demonstrates the close link between training, O & M, and work study.

KEY INVESTIGATION AREA NO.3 – PERFORMANCE

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Does the company have overall performance standards?		
Are standards laid down for each job? Are they up-to-date? Are they understood? Are they capable of improvement? Are they reached – by everyone? Are they reached quickly? Are they reviewed regularly?		
Where could training provide *– extra knowledge?* *– extra skills?* *– improved attitudes?*		
and so enhance performance?		

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"...about delegation"

Delegation, particularly if one accepts the hierarchical or 'tree' style of organisation, is essential in order to free senior managers, technical specialists and, in some cases, craftsmen from routine or disruptive chores. The training implications here are (1) the need for 'stand-ins' to be prepared, and (2) the need for those in senior positions to overcome the fears and prejudices which prevent them from delegating successfully.

Case Extract

A production manager in a medium-sized food company was unhappy with a line supervisor he had himself appointed as a bright prospect. The supervisor appeared intelligent but in the manager's opinion lacked decisiveness. Consequently the manager found himself spending a lot of time on the line and at times felt virtually forced to take over. When the manager was sick for two weeks, a number of problems developed, one of which had severe quality repercussions. As a 'last ditch resort', it was suggested that the manager should 'stand back' and begin tutoring the supervisor off the line, using line results as a basis and discussing objectives at the same time. In the first two weeks, the manager discovered that (a) the supervisor did not understand the cost or wage incentive system (nobody had explained them properly); (b) he did not really understand his role, especially in relation to discipline; and (c) he had been considerably intimidated by the manager. After three months of 'non-interference', with weekly tutoring and feed-back of results, the supervisor was operating with more authority, had increased line performance, and had reduced the reject rate by 20%. The manager was able to devote time to process development work which he had previously neglected.

This is another example of how frequently training is involved with communication. Most of the damage here could be traced to misunderstandings which emerged only when training activity was instituted.

KEY INVESTIGATION AREA NO.4 – DELEGATION

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Does pattern of delegation allow senior managers time to think and plan?		
Does inadequate delegation interfere with work of skilled employees?		
Which decisions could profitably be taken at a lower level?		
Which jobs are key jobs without which the operation would falter?		
Are trained 'stand-ins' available to assume responsibility in case of absence?		
Would more responsibility 'enrich' certain jobs and lead to improved industrial relations?		

"...about the labour situation"

The recruitment and labour turnover situation of a company is often the real start-point for assessing its training needs. A high labour turnover percentage, for example, can be due to many factors, one of which may be inadequate training. (It is a fact that people who find themselves in jobs without sufficient preparation tend to leave at the first opportunity.) Also, since recruiting starters is expensive, it is imperative to bring them to peak efficiency as early as possible.

Case Extract

A large provincial bakery, with two factories, eight distribution depots, and three-hundred vans serving East Anglia, noted that staff turnover among its van salesmen was rapidly soaring. This was seen in the cost of hiring and training replacements, as well as in a distinct loss of customer goodwill. The training officer began his remedy by joining the men on their rounds. After discussing his observations with managers and supervisors, he drew up a 3-week training programme to teach every aspect of the job (18 subjects including 'procedures', 'customer contact', 'basic calculations', 'product knowledge' and 'vehicle care'.) The course, which took place at the salesmen's own depots, was followed by a four-day summing up at the company's training school. In less than two years labour turnover decreased by 25%, saving some £10,000 p.a., while virtually every other aspect of the sales operation was also improved.

This example demonstrates how vigilance over trends can show up an overall *need. Detailed needs can then be deduced from a closer study of the problem, i.e. by studying the jobs concerned at close quarters.*

KEY INVESTIGATION AREA NO.5 – RECRUITMENT AND LABOUR TURNOVER

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Have we scheduled future staff requirements of each department/ category – due to retirement? – due to expansion? – due to labour turnover?		
Are induction and training planned for all starters?		
Is training *directly* based on the knowledge, skills and attitudes needed for the job?		
What is the labour turnover rate by department/category?		
What percentage of leavers depart – during training? – shortly afterwards?		
Do revised selection standards indicate need for different training?		
Are trends in the labour situation – improving? – static? – worsening?		
Is anyone in company trained to 'look after' new employees?		

"...about pay and careers"

It used to be said that the simpler a job, the happier the employee. However, after a few decades of mass production, many people are beginning to believe the reverse to be true. As a result companies are now beginning to aim to 'enrich' their employees' jobs – with increased responsibility, opportunities for decision-making, and greater participation in both activities and profits. In many cases this prospect is as important as direct remuneration, a fact which is not always fully appreciated.

Case Extract

A large food manufacturing company found that, although it was able to recruit the r ht career candidates, the abler ones invariably left after two years – the po... t which they began to be useful. On investigation the company decided that neither its pay structure nor its selection criteria were at fault, but that it was recruiting too many starters. It also found wide differences in the rate of progress of trainees. A year later it introduced a training programme built around the concepts of opportunity, reward, *and adequate preparation*, making sure that this was explained and understood at the initial interview. It also recruited 50% fewer starters and promised pay increases linked to performance. As a result, those who do not now measure up tend to leave, while those the company wants, stay – at higher pay.

This is another example of how the process of self-examination can identify a general *problem area, prior to a more detailed study to determine the precise training needs.*

KEY INVESTIGATION AREA NO.6 – CAREERS AND PAY

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Is the supply of 'career employees' sufficient to meet requirements – in the immediate future? – in the long-term?		
Are career prospects sufficient to attract the people needed?		
Are managers and supervisors trained to recognise/foster latent talent?		
Do they subconsciously suppress talent out of insecurity?		
Are employees with career potential – given enough opportunities? – made aware of opportunities? – prepared for advancement?		
Are key people prone to leave? If so, why? Is training at fault?		
Are pay structures, especially productivity rates – adequate? – fully understood?		
Are company benefits properly explained during induction and training?		

"...about sales"

Many companies, when they first consider training, think in terms of their sales force. It is certainly true that basic sales training normally pays handsome dividends. Nevertheless there are other aspects to this question of selling awareness. For example, production and clerical people do not always realise that the entire revenue of most companies accrues from its sales, and that it is their performance which the salesman sells: *their* quality, *their* reliability, *their* delivery times.

Case Extract

A small animal feed company (87 staff) found itself being squeezed out of a highly competitive market. Certainly it could not compete on price. After developing a superior product, it decided – in the early 1950's – that it had to overhaul its selling operation in order to 'get home' its product story. Early sales training produced negative results. Directors then began taking courses, imbibing new skills in order to disseminate them throughout the company. The next sales training effort succeeded. Lorry drivers, particularly, were trained to be customer-conscious; they looked after farmers' stock rotation, made sure that bags did not burst, and were generally helpful. Growth levelled at 15% per year and has stayed there for nearly twenty years – compared with an average of 2% for the industry as a whole. The company's commitment to training in depth is now absolute and is being applied to all departments and all levels.

This small company represents a first-class example of the effects of creating sales awareness in all departments. The full case study can be seen on request.

KEY INVESTIGATION AREA NO.7 – SALES

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Does sales management know the difference between 'marketing' and 'straight' selling ? Is the difference applied ?		
Are sales targets being – set ? – met ?		
Do sales men receive elementary/ advanced sales training ?		
Do they receive training in – social skills ? – product knowledge ? – use of selling aids ?		
Are new markets/products/outlets likely to call for re-training ?		
Which jobs involve *direct* selling ?		
Which jobs involve *indirect* selling, i.e. service departments ?		
Are non-sales departments aware of sales functions ?		
Is the company's 'image' being upheld at all levels ?		

"...about costs and finance"

There are two important areas where training is frequently indicated as a means of reducing costs. The first is the case of the small-to-medium business where management realises that its knowledge of modern management accounting techniques is desperately inadequate. The second is concerned with the need for general 'cost-awareness' among all employees regardless of their job or status.

Case Extract

A retail butchery firm with nearly two-hundred branches, renowned for both the quality of its produce and its commercial success, likes to ensure that its trainee managers are profit-conscious. Its method of doing this is via a practical exercise. The trainee managers are asked to cut up a beast in any way they choose and to price the elements. The object is to arrive at maximum profitability with the least waste.

This example is included as a demonstration of how a theoretical topic such as cost-awareness can be transformed into a tangible and memorable training exercise.

KEY INVESTIGATION AREA NO.8 – COSTS AND FINANCE

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Is management fully aware of the need for/working of basic management accounting procedures?		
Is management (especially of the smaller business) aware of all the sources of finance/financial advice available?		
Do *all* employees – understand cost implications of their jobs? – have cost targets? – receive cost information? – have real control over costs for which they are responsible? – work to budgets? – feel free to contribute cost-reducing ideas?		

28

"...about methods and work study"

Training is very closely associated with work study techniques and practice for a number of reasons. First, because the principle of work study needs to be sympathetically explained to staff if it is not to become the cause of friction. Second, because work study frequently suggests new methods which can be made operable only through training. Third, because the very act of evaluating a trainee is a form of work study. Fourth, because an employee's difficulty with a task may indicate a need not so much for training as for a new method.

Case Extract

In order to produce a training film a training consultant filmed a certain packing operation at a food manufacturers. The film was subsequently shown to a work study specialist who devised a new technique for filling the boxes. The new technique required 'awkward' (meaning unconventional) movements and thus presented major obstacles which only re-training could overcome. Once mastered, the new method reduced box-filling time from over 4 seconds to 2.8 seconds – an increase in through-put of over 30%. Had this discovery not been made it would soon have become necessary to duplicate the plant – or restrict production. Training also resulted in workers' peak efficiency being reached in three weeks instead of six months.

The example is chosen for the way it demonstrates the close link between training and work study.

KEY INVESTIGATION AREA NO.9 – METHODS, PLANT ETC.

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Is layout of each area carefully planned for – best work flow ? – ease of working ? – least unnecessary work ? – minimum movement of people and materials ? – ease of supervision ?		
Could handling be made – easier ? – faster ? – less dangerous ? – less wasteful ?		
Are all regulations about methods understood ? – obeyed ?		
Are jobs duplicated ?		
Are systems vulnerable to human error ?		
Does company have a qualified work study officer ?		
Is he consulted on training ?		
Are methods regularly reviewed ?		
Are staff encouraged to suggest method improvements ?		
Is machine down-time recorded and analysed considering – mechanical breakdowns ? – raw material failures ? – operator effects ?		
Have improved maintenance systems been considered ? – planned inspections ? – scheduled maintenance ? – preventive maintenance ? – faults analysis training ?		

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"...about stock control"

The lack of a satisfactory stock control system (sometimes called 'inventory control') causes serious problems, a fact which is being increasingly realised by managements. Overstocking ties up capital and can lead to waste; while understocking or the 'wrong mix' can impair production. A wide variety of techniques of stock control is available; the primary training implication being that in most cases both the stock manager and the production manager will need to acquire knowledge from outside sources. A secondary training implication is that they will then have to train their operatives to work the new procedures correctly, or the problems may be magnified instead of eliminated.

Case Extract

A small beverage manufacturer was plagued by frequent out-of-stock situations on some varieties of packaging. Management was aware that packaging materials were being trampled underfoot, owing to the lack of adequate storage. Nobody, however, knew the true extent of the problem. On investigation it was discovered that packaging material worth several thousands of pounds was being destroyed each year, whilst a large part of the proper storage area was occupied by obsolete materials. Consultants advised that several improvements were required urgently, among them the introduction of a stock rotation and recording system linked to a production forward plan, and a more satisfactory method of storage. The production manager, whose responsibility it became, attended a series of short seminars on stock control and production planning. Then, together with his foreman, he put in the necessary systems and equipment. Immediately 'floor waste' disappeared and a substantial impact was made on the out-of-stock problem.

In this case the problem appears at first glance to be purely one of organisation and equipment. The training implication is the fact that a senior executive had to go 'outside' to acquire knowledge before it could be disseminated within the company.

KEY INVESTIGATION AREA NO.10 – STOCKS AND MATERIALS

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Has the company a clearly-defined stock control system?		
Is it *fully* understood by all employees in contact with it?		
Are effects and costs of waste appreciated?		
Do methods of preventing waste, damage, loss, pilferage etc, form part of basic training?		
Are figures for waste and other losses *known* to managers?		
Are waste reduction programmes/ incentives in operation?		
Do staff realise the dangers of stock levels being – too low? – too high?		
Are security regulations – known? – observed?		

"...about quality and hygiene"

No food company, obviously enough, has a future without quality and hygiene. This is one rule in which most employees in the food industry receive training. But could quality be improved that little more, if it were paid just a little more attention, and would this ultimately produce more sales?

Case Extract

A food processing company with a reputation for quality was receiving numerous customer complaints: the number of portions in its standard-size packs was less than stated. Quality control checks confirmed a high incidence of underpacks coming off the line. Investigation revealed that (a) packers were using a variety of methods; (b) supervisors were not reacting to reports from weighing and quality checks; and (c) the extent of the problem was not understood by supervisors and packers. After discussion the work study department decided to re-study the job and define an optimum method; the training officer arranged training for the line supervisor in the new method and in using information received from line checks and quality control; and the production manager talked to the packers line-by-line in the canteen, explaining the problem and indicating the effects on customers by reading their complaints. Each packer was then re-trained to use the new method by instructors. The results were a dramatic drop in under-packs from an average of 20 per shift to 1 per shift on check weight and the complete disappearance of customer complaints within 8 weeks, plus an incidental 15% increase in packing performance.

This is a clear-cut example of how training can be organised to meet specific objectives, *one of the most important characteristics of the systematic approach.*

KEY INVESTIGATION AREA NO.11 – QUALITY & HYGIENE

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Are quality standards automatically made known for *– new raw materials ?* *– new processes ?* *– new products ?*		
Are they immediately *– understood ?* *– observed ?*		
Is it time old standards were refreshed in people's memories ?		
Which sections are weakest on quality ?		
Are responsibilities for quality clearly apportioned ?		
ARE HYGIENE RULES *– CLEARLY DEFINED ?* *– DISPLAYED ?* *– UNDERSTOOD ?* *– OBSERVED AT ALL TIMES ?* *– REGULARLY RETAUGHT ?*		

"...about industrial relations"

It is not always appreciated that one of the factors which can help to relieve industrial tension is training. Managers and supervisors must begin to understand the full implications of every decision and action, whether or not they are directly involved with industrial relations; while staff must begin to understand their company's competitive situation, as well as the implications of any laws and agreements binding on them.

Case Extract

A small company producing and selling a raw material found itself having to augment its own 0.4 tons per hour output by importing from the continent. Furthermore, in the packing department morale was at a low ebb and labour turnover had reached 70%. A survey indicated that a re-design of jobs and the introduction of a productivity-based payment system could give greatly increased output at a lower manning level. It was, however, felt that there was little likelihood of getting real benefit from the changes proposed unless: (a) management and supervision were fully committed to the changes; (b) shop stewards and operatives fully understood the implications, since their pay and jobs were affected; and (c) an effective job re-training programme was instituted. The company and the union arranged a series of joint sessions for supervisors, shop stewards and operatives on work study and, separately, on the proposed changes. *These were run at a very early stage in discussion and negotiation before any firm decisions had been made.* In addition, supervisors and stewards received detailed training in the work measurement techniques to be used, and a supervisor and four instructors were sent on a TWI-JI course to prepare for the re-training. As a result positive attitudes were created towards the proposed changes and the new working, manning and payment systems were successfully introduced. This resulted in a higher quality output of up to 1 ton per hour, and a sustained reduction in labour turnover from 70% to 15%.

The important points about this example are that the company saw the need to send its supervisory staff on work study and instructor courses (both of which helped them to carry out their roles without losing the co-operation of those whose jobs were affected); that all aspects of training were carefully integrated; and that the training was tailored to specific objectives.

KEY INVESTIGATION AREA NO.12 – INDUSTRIAL RELATIONS

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
If changes of any kind are planned (product, processes, premises, etc.) will employees have these explained to them?		
Is industrial relations training a part of the training for all managers, supervisors, workplace representatives?		
Do employees understand full implications of conditions of employment, legal contracts, etc.?		
Has anyone in the company been instructed to advise on industrial relations matters?		
(Please ask the Board for a more comprehensive check list for assessing industrial relations training needs.)		

"...about the Law"

Commonly induction training, whether for managers or operatives, includes a study of the law as it stands. Managers who underwent management training during 1968, for example, are no doubt fully conversant with the Trade Descriptions Act. The problem comes in later years when amendments are made to statutes, the full effects of which are often learned only from newspapers and the 'grapevine'. Legal requirements, perhaps more than any other aspect of certain jobs, need to be the subject of regular refreshment training.

Case Extract

A small company wishing to enter the export market sent a member of its clerical department on an exporting course. Its immediate objective was to keep down the cost of export documentation by obviating the need for specialist help. While attending the course, the executive absorbed invaluable information about the company's position in relation to bad debts accrued in overseas countries, and about the various government agencies which could protect the company. As a direct result of his acquiring this knowledge the company was able to secure itself against a bad debt which did, in fact, transpire.

Although partially connected with law, this example also illustrates how objective-based training can sometimes lead to unexpected benefits.

KEY INVESTIGATION AREA NO.13 – THE LAW

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Are managers aware of *all* the possible implications of : – existing laws ? – proposed laws ? relating to such matters as – hygiene ? – use of additives ? – labelling ? – packaging ? – trade descriptions ? – overseas food regulations ? – standards (metrication) ? – employment ? – safety ? – vehicles ? – finance ? – exporting ? – taxes ? – insurance ? – etc., etc.		
IS THIS KNOWLEDGE UP TO DATE ?		

"...about safety"

Safety training might be said to break down into two stages. On the one hand it is essential to bring to the notice of work people all the rules and procedures laid down for their job. On the other hand, there is the more subtle task of persuading them of the need to *observe* safety standards. The first is relatively simple; the second calls for considerably more skill on the part of training personnel. The assessment should determine at which stage the company's safety training stands in relation to each job category.

Case Extract

A medium-sized plant processing dangerous chemicals had scrupulous safety procedures relating to fire and explosion hazards. These were backed by a comprehensive safety training programme aimed at preventing major occurrences. However, despite a good record for major accidents, there was a high incidence of minor accidents involving time off work. To combat this, a propaganda campaign was mounted and supervisors were trained in TWI-Job Safety . . . with little noticeable effect. Subsequently, at a joint safety committee meeting, the senior shop steward suggested that union representatives could contribute by influencing workforce attitudes in their departments. The suggestion was welcomed by management and formal training was arranged for the designated stewards. Their course, based on TWI-Job Safety and RoSPA Safety Officer training, concentrated on hazard recognition. It was agreed that the trained stewards should have no formal status but would concentrate on influencing members on the shop floor. Supervisors were also briefed on the stewards' role in relation to safety, and at another joint meeting problems, priorities, and proposed action were agreed. Within a month of the stewards returning to their departments the drop in the minor accident rate was dramatic.

Sometimes prescribed and conventional training methods can be supplanted by more original solutions. A later guide in this series will deal with training methods in more detail.

KEY INVESTIGATION AREA NO.14 – SAFETY

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Are safety rules – clearly defined ? – displayed ? – understood ? – obeyed ?		
ARE THERE UNAVOIDABLE HAZARDS REQUIRING REPEATED SAFETY TRAINING ?		
Do accident statistics point to a habit/attitude that could be trained-out ?		

"So much for the questions-what now?"

Any company which makes a thorough job of the self-questioning process outlined in this guide will unearth a wide variety of possible training needs – some serious, some less serious – together with the occasional purely organisational problem.

The next and final stage in preparing this assessment is to organise these findings into some sort of logical pattern, so that they can be looked at more carefully and awarded priorities. This is best done along these lines:

1. *Collate the findings*
The first step is to compile a straightforward list of all the findings which *appear* to have training implications. (Organisational problems which obviously have *no* training implications should be listed separately.)

2. *Group the needs*
The next step is to sort these possible training needs into groups. The following four headings are suggested:

GROUP A – NEW STARTERS

GROUP B – KEY JOB HOLDERS

GROUP C – EFFICIENCY PROBLEMS

GROUP D– FURTHER INVESTIGATION

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3. *Add the facts, examine the benefits*
A principle of systematic training already mentioned is that the first training to be done should always be that which promises the *biggest pay-off or that which is vital for any other reason.*

Looking at the four grades, priorities are likely to hinge on certain factors:

PRIORITY TEST FOR TRAINING NEEDS

NEW STARTERS

Systematic induction and job training are ESSENTIAL. Should lead to *measurable* improvements in such areas as labour turnover, recruitment training costs and times, accident rates, etc. In many cases estimated benefits *can* be quantified.

KEY JOB HOLDERS

By definition a key job ought to represent a vital training need.

A 'key' job is a job:
- with a high skill content
- which can result in wastage, loss or damage if not carried out with skill and judgement
- which traditionally requires a substantial period of training
- which is difficult to fill and keep filled
- which, if not done because an absentee has no trained deputy, could cause disruption.

EFFICIENCY PROBLEMS

Again, many benefits of improved efficiency can be quantified providing the initial objectives are clear, e.g.:
- reduced labour recruitment
- increased saleable production
- decreased training periods
- increased machine utilisation
- reduction in wastage, loss, etc.
- reduced absenteeism (through accidents or stoppages resulting from inadequate communication)
- lower cost of vehicle/machine maintenance.

FURTHER INVESTIGATION

Sometimes it may not be clear whether certain training implications are of a low or a high priority. Decisions can only be reached after further examination of:
- existing data
- specially collected data
- consultants' surveys
- application of such techniques as work measurement and activity sampling.

Finally, having assessed the urgency of each training need, a definite priority should be given to each one. They should then be grouped according to whether they are short-term (1-3 months), medium-term (3-6 months), long-term (6-12 months). The rudiments of a company training plan can then be seen.

Completed Example

A medium-sized animal feed company employing 131 has an annual wage bill of £160,000. It operates on a regional basis using mechanised but not fully-automated plant. Total manufacturing and selling costs are £38.72 per ton with raw materials comprising some 75% of this total. Current trading conditions are difficult and net profit to sales is low at some 2.4%. Production and selling staff are on incentive bonus, and with the high raw material element, fixed costs are approximately 10% of the total. Completed questionnaires for three investigation areas (see facing pages) reveal the following training needs and other action required:

1. Training for Mill Supervisor prior to promotion to Mill Manager.
2. Training for Mill Foreman prior to promotion to Mill Supervisor.
3. Training for replacement Mill Foreman after recruitment or promotion.
4. Training for new sales representative and nutritionist.
5. Training for new drivers and investigate labour turnover among drivers.
6. Short course for part-time Training Officer (the Sales Director).
7. Training in the production department aimed at improving output.
8. Investigate blending errors and train if necessary.
9. Co-ordinated sales training for experienced reps. linked to productivity.
10. Training for indirect-selling staff to be considered.

The needs were grouped

Before priorities could be established these possible training needs were grouped as follows:

GROUP A *New Starters*	*GROUP B* *Key jobs*	*GROUP C* *Efficiency problems*	*GROUP D* *Further investigation*
(Sales Rep.)	Sales Representative	Production training for higher output	Driver labour turnover
(Nutritionist)	Nutritionist		Mill Foreman vacancy
Drivers	Future Mill Manager	Sales training for improved performance	Blending errors
	Future Mill Supervisor		Indirect selling staff
	Part-time Training Officer		

KEY INVESTIGATION AREA NO.5 – RECRUITMENT AND LABOUR TURNOVER

QUESTIONS	*PEOPLE AFFECTED*	*POSSIBLE TRAINING NEED*
Have we scheduled future staff requirements of each department/ category – due to retirement? – due to expansion? – due to labour turnover?	Mill Manager retires in 12 months. Effects Mill Supervisor and Mill Foreman. One new Nutritionist and Sales Rep. About 18 new Drivers per year.	Programme for Mill Supervisor to succeed Manager. Programme for Mill Foreman to succeed Supervisor. New Foreman? Recruit or train. Induction and job training. Induction and job training.
Are induction and training planned for all starters?	On regular basis for Drivers.	Maybe needs improvement.
Is training *directly* based on the knowledge, skills and attitudes needed for the job?	No. Job descriptions being written.	Part-time Training Officer to investigate.
What is the labour turnover rate by department/category?	Overall 15%. Transport 100%.	Driver Induction and Job training needs overhauling.
What percentage of leavers depart – during training? – shortly afterwards?	No figures Drivers!	Perhaps we should produce these figures.
Do revised selection standards indicate need for different training?	Not indicated.	
Are trends in the labour situation – improving? – static? – worsening?	Static but Driver turnover significant.	The whole question of Driver turnover requires examination.
Is anyone in company trained to 'look after' new employees?	Formally no. Part-Time Training Officer? Transport Manager?	The part-time Training Officer may need a short course in training techniques.

Staff structure:
5 management
10 Supervisors (4 mill, 2 transport, 2 office, 2 warehouse)
3 administration (2 accountants, 1 cashier)
3 technologists (1 nutritionist, 1 poultry adviser, 1 lab. assistant)
20 clerical (9 clerks, 6 machine ops., 5 sec/typists)
16 sales representatives
74 operatives (40 production, 15 transport, 9 warehouse, 10 maintenance)
131

The benefits were estimated

The likely benefits and relative importance of each possible course of action were then decided as follows:

GROUP A
New starters

Drivers required at rate of 18 per annum. Assuming £100 to recruit, select and train each driver, equals £1,800 p.a. At present drivers are recruited with HGV licence and trained by working alongside others for 1-2 weeks. Assume thorough overhaul of induction and job training reduces labour turnover by 20%, equals a *saving of £400 p.a.* (less additional training cost, if any).

GROUP B
Key jobs

Sales representative must be effective (say to 75% experienced rep. performance) in three months and fully effective in six months.

Nutritionist, qualified on recruitment, should be fully effective after introductory training, say one month.

Mill Supervisor probably taking over from Mill Manager in a year (decision required in six months). Will require urgent training in administration and planning.

Mill Foreman taking over from Mill Supervisor will require updating in administration and maintenance procedures.

Part-time Training Officer (Sales Director) will require short course in training methods in order to implement proposed training programme.

GROUP C
Efficiency problems

Production statistics show 10% variation between best and average crews of five units, indicating a potential output increase of 80%. Assuming co-ordinated training and application of management controls could increase output by 5% without extra working. This would reduce total costs by £0.19 per ton.

Sales director decides 5-10% increased output could be sold without additional sales staff provided co-ordinated programme of training and planning is instituted.

GROUP D
Further investigation

Labour turnover among drivers is serious, especially in view of their sales function. The following should be examined: precise cost of labour turnover; wage rates and data on local conditions; incidence of leaving within three months (could indicate poor training or induction).

Mill Foreman. Replacement's job specification needs defining and decision is required re promotion from within or outside appointment.

Blending errors being committed by experienced staff. Obvious area for Training Officer to investigate.

Indirect selling staff (*drivers*) might also be subject for training. Discuss with Training Board.

KEY INVESTIGATION AREA NO.3 – PERFORMANCE

QUESTIONS	PEOPLE AFFECTED	POSSIBLE TRAINING NEED
Does the company have overall performance standards?	Management. Yes. Gross margins, Return on Capital, etc.	
Are standards laid down for each job? Are they up-to-date? Are they understood? Are they capable of improvement? Are they reached – by everyone? Are they reached quickly? Are they reviewed regularly?	Key performance areas reviewed. There are 10% performance differences between shifts and individuals. Blending errors! Sales?	Better production outputs – management, supervision, staff. Investigate the Blending operation – errors costly! Better production output will imply better sales training.
Where could training provide *– extra knowledge?* *– extra skills?* *– improved attitudes?* *and so enhance performance?*	Production staff (Management, Supervisors, Operators) Sales Staff.	Review and improve production training for increased output. Investigate Blending Section. Coordinated Sales Training.

KEY INVESTIGATION AREA NO.7 – SALES

QUESTIONS	PEOPLE AFFECTED	POSSIBLE TRAINING NEED
Does sales management know the difference between 'marketing' and 'straight' selling? Is the difference applied?	Yes!	None
Are sales targets being – set? – met?	Sales Reps. Performance is reviewed but no targets as such.	Sales Director feels that further improvement in performance is possible. Say 5 to 10%.
Do sales men receive elementary/ advanced sales training?	Elementary training given.	Coordinated sales drive with experienced reps receiving further training.
Do they receive training in – social skills? – product knowledge? – use of selling aids?	Product knowledge good.	
Are new markets/products/outlets likely to call for re-training?	No.	
Which jobs involve *direct* selling?	Representatives.	
Which jobs involve *indirect* selling, i.e. service departments?	Drivers. Telephone girls. Sometimes production.	Perhaps this is an area which we should investigate. Series of talks and discussion?
Are non-sales departments aware of sales functions?	As above. They should be.	
Is the company's 'image' being upheld at all levels?	Yes.	

The priorities were decided

Possible training needs and courses of action suggested by the opening assessment were then allocated priorities as follows:

Training need	*Estimated benefit*	*Action*	*Time-scale*
SHORT TERM (1-3 months)			
Sales Director to take training course in order to carry out entire programme (as part-time Training Officer)	See below	Book 8-day course for Part-time Training Officers. Obtain list of courses from Board	Immediately
Introductory training for Nutritionist	Effective contribution to all operations	Plan in-company induction course - (See Board guides)	Complete within two months
Introductory training for Sales Representative	Proportionate contribution to sales effort		Complete within three months
Revise introductory job training for drivers and investigate labour turnover	Possible £400 p.a.	Plan in-company course - and collect further data	Commence in two months
MEDIUM TERM (3-6 months)			
Co-ordinated training programme for production and sales staff	Reduce total costs by £0.19 per ton	Await return of Sales Director from training course	Commence in four months
Determine Mill Foreman's successor	Essential	Prepare job spec. etc.	Commence in four months
Train successor to Mill Manager Train successor to Mill Supervisor Train successor to Mill Foreman	Essential Essential Essential	Analyse jobs and prepare job specifications	In six months
LONG TERM (6-12 months)			
Investigate blending with a view to training	To be evaluated	Collect data	Commence in eight months
Training for indirect selling staff (drivers etc.)	To be evaluated	Consult Training Board	Commence in twelve months

Further guides in this series examine other stages in the systematic training cycle, including Job Analysis, Training Plans and Programmes, and the Training of Trainers.

For more information about these and other publications contact the Board's Information Services Department. For advice on training matters consult the Training Department.

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